Project Charter Development

Defining our CPI/LSS Projects

Title 40/CCA Certification & Confirmation

2 December 2008

Agenda

Defining our CPI/LSS Projects

Objectives:

- **Instruction on Project Charters**
  - **Components of the charter**
  - **How to create a charter**
- **Working Session for CCA LSS Project Teams**
  - **Project teams formed**
  - **Project teams complete "Draft" project charters**
- **Charter Review by Working Group**
  - **Working Group reviews all charters and provides feedback as necessary to project teams**

Time	Topic	Details	Facilitator
15 min	Instruction: Project Charters	MBB instructs the group on the components of a project charter & how to create a project charter.	Penny
75 min	Project Team Work-Out Session	Project teams are formed and each team will construct the draft charter for their particular LSS project.	Penny/Project Leads
30 min	Charter Review & Wrap-up	(1) Working Group is reconvened and provides feedback on all project charters. (2) Questions, Answers, Next Steps & Action Item Review	Penny

Next Steps

Defining our CPI/LSS Projects

- **Next Meeting:**
  - **TBD (Day of Week, Time & Location)**
- **Homework: TBD**
- **Action Item: TBD**
- **Today's Focus: (1) Provide Working Group instruction on project charter components and charter creation (2) Provide time for project teams to be formed and create draft charters of their particular LSS projects.**

Charter & Timeline

Defining our CPI/LSS Projects

Team Members			
Name	**Role**	**Affiliation**	**DACI**
	Green Belt		Driver
	Master Black Belt		Driver
	Sponsor		Approver
	Process Owner		Approver

Problem Statement:	What is the problem
Business Case:	What benefits will be achieved as a result of the project
Unit:	How is an action identified (what is a defect from) What is moving through the process
Defect:	Describes an unacceptable unit
Customer Specifications:	Describes what the customer considers to be poor performance (design – good performance)
Start:	Defines when a process/unit starts
Stop:	Defines when a process/unit is considered complete
Scope:	Defines what part of process is included or not included Defines the organization or area where process

Take away message goes here (impact of problem)

Timeline			
Phase	**Planned**	**Actual**	**Status**
Define	dd mm yy	dd mm yy	
Measure	dd mm yy		
Analyze	dd mm yy		
Improve	dd mm yy		
Control	dd mm yy		

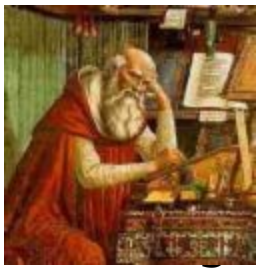
Problem Statement

Defining our CPI/LSS Projects

Charter	
Problem Statement:	<who what where when> 1-2 sentences that explain why you are working on this project, what is the pain that you or your customers are experiencing
Business Case:	• <Benefit to Directorate> • <Benefit to Agency/Tie to Strategic Plan> • <How would improvement enable mission success> • <How would the improvement help our internal or external customers>
Customer Specs:	<succinct VOC> what is it th… reduce cycle time, what is a… customer? If it is to reduce … an acceptable level of error
Scope:	<describe what elements of… from analysis>
Start:	<starting point of the PROCESS, not the project>
Stop:	<end point of the PROCESS, not the project>
Unit:	<the thing being processed>
Defect:	<what you're trying to eliminate – what would your customer consider a defect – ex: any item taking longer than 3 business days to process>

Problem Statement:	**<who what where when> 1-2 sentences that explain why you are working on this project, what is the pain that you or your customers are experiencing**

- The problem statement should explain the "so what" – i.e. why are you working on this project?
- Explain the pain the customers and/or workers of your process are feeling
- Keep it brief and to the point.



Effective Problem Statement

Defining our CPI/LSS Projects

- **Who (who cares)**
  - –JD Consulting Services
- **What (what's wrong)**
  - –6 out of 25 RFP missed deadlines; 23%
- **Where (where is the problem)**
  - –Management Services
- **When (time period being analyzed)**
  - –In the last 6 months (Nov – Apr 2008)
- **Why (why do I care-pain/what is affected)**
  - –5 million dollars in lost revenue

Problem Statement

Management services exceeded the Request For Proposal (RFP) deadline, 23% of the time (6 times out of 25) in the last six months, resulting in 5 million in lost revenue for JD Consulting Services.

DRAFT Problem Statements

Defining our CPI/LSS Projects

- Project #1 -- Measures of Effectiveness (MOEs) and Post-Implementation Review (PIR) are lacking or poorly defined within the requirements, budgeting, and acquisition processes.

- Project #2 -- The Post-Implementation Review (PIR) planning and execution process is insufficient.

- Project #3 -- The Title 40/CCA compliance process is not optimally integrated with the requirements and acquisition processes.

- Project #4 -- Business Process Reengineering (BPR) is not being adequately addressed by the appropriate entity at the appropriate time.

Charter Draft & Report Out

Defining our CPI/LSS Projects

Name	Role	Affiliation	DACI
	Green Belt		Driver
	Master Black Belt		Driver

Instruction

1. **Review your draft problem statement and Refine… 20min (tips on next 2 slides)**

1. **Report out…5 min max**

Remember

6-8 weeks for GB Project

3-4 Months for BB Project

Problem Statement:	
Business Case:	
Unit:	
Defect:	
Customer Specifications:	
Start:	
Stop:	
Scope:	

		Actual	Status
Define	dd mm yy	dd mm yy	
Measure	dd mm yy		
Analyze	dd mm yy		
Improve	dd mm yy		
Control	dd mm yy		

Challenges – Problem Statement

Defining our CPI/LSS Projects

- Problem Statement
  - Our company's procedure for submitting responses to RFPs has many delays because we have to gather information from multiple departments.
- Implying a Cause
  - It is up to the project team to find the cause of a problem. Preconceived ideas about cause may be inaccurate, incomplete, or mistaken and can mislead the team and negatively impact teamwork.

Challenges – Problem Statement

Defining our CPI/LSS Projects

- Problem Statement
  - We submit 23% of our responses to RFPs past the due date. We could reduce late responses with the installation of a new computer based collaboration system.
- Suggesting a Solution
  - Without knowing the cause, it is not possible to find an effective remedy. Attempts to solve a problem without knowing the cause are doomed to failure.
  - This Statement implies that the problem would be remedied by a software package no matter what the actual cause of the delay.

Business Case

Defining our CPI/LSS Projects

Charter	
Problem Statement:	<who what where when> 1-2 sentences that explain why you are working on this project, what is the pain that you or your customers are experiencing
Business Case:	• <Benefit to Directorate> • <Benefit to Agency/Tie to Strategic Plan> • <How would improvement enable mission success> • <How would the improvement help our internal or external customers>
Customer Specs:	<succinct VOC> what is it t… reduce cycle time, what is … customer? If it is to reduce… an acceptable level of erro…
Scope:	<describe what elements o… from analysis>
Start:	<starting point of the PROC…
Stop:	<end point of the PROCESS…
Unit:	<the thing being processed…
Defect:	<what you're trying to elim… defect – ex: any item taking longer than 3 business days to process>

Busines s Case:

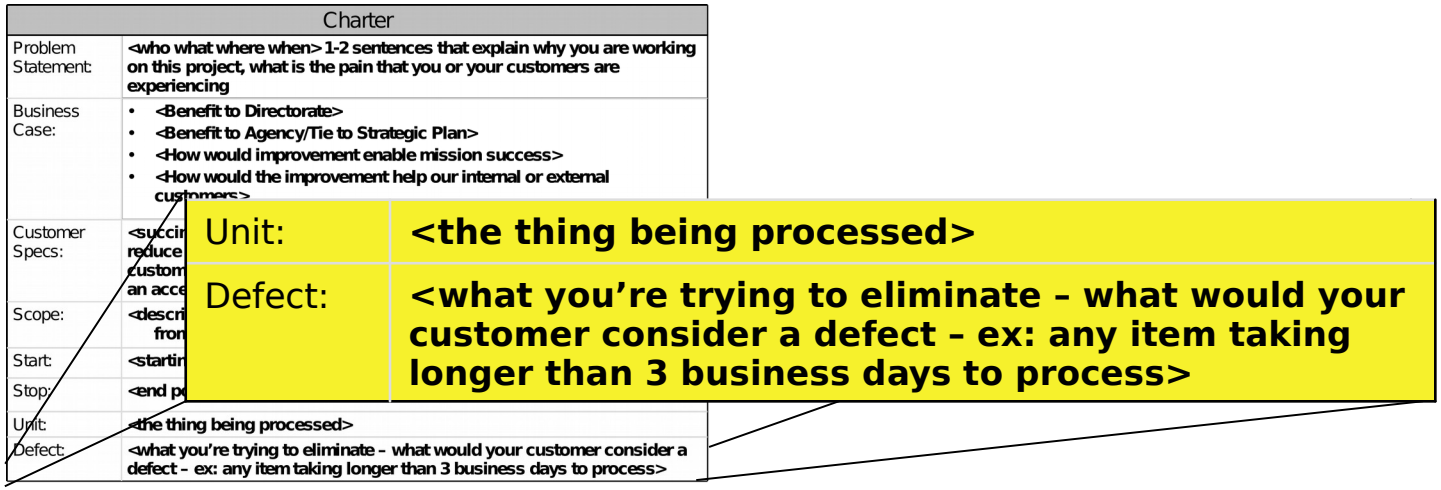
As a result of this project…

- **<Benefit to Directorate>**
- **<Benefit to Agency/Tie to Strategic Plan>**
- **<How would improvement enable mission success>**
- **<How would the improvement help our internal or external customers>**

- The business case should give an indication of the proposed benefits the team will achieve by working on this project.
- At this point – the benefits will be high level but can be updated with further quantification as you uncover information in subsequent phases
- Remember to consider the various Cost of Poor Quality (COPQ) elements

Unit & Defect

Defining our CPI/LSS Projects



- A "unit" is the thing being processed. For example, if you are examining the on boarding process for new hires, the unit might be one new employee.
- A "defect" is what determines if you would deem a unit as unsuccessfully going through your process. For example, if you are examining the on boarding process for new hires, the defect might be taking greater than 5 business days to complete all on boarding tasks.

Customer Specs

Defining our CPI/LSS Projects

Charter	
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Business Case:	• <Benefit to Directorate> • <Benefit to Agency/Tie to Strategic Plan> • <How would improvement enable mission success> • <How would the improvement help our internal or external customers>
Customer Specs:	<succinct VOC> what is it that your customer expects? If this project is to reduce cycle time, what is an acceptable cycle time in the eyes of your customer? If it is to reduce an acceptable level of error
Scope:	<describe what elements of from analysis>
Start:	<starting point of the PROC
Stop:	<end point of the PROCESS
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Customer Specs:

- **Describes what the customer considers to be poor performance (design – good performance)**

- Identify what your customers measures as a defect from this process?
- What did the customer say they expected from this process?

If this project is to reduce cycle time, what is an acceptable cycle time in the eyes of your customer?

If it is to reduce defects – define what the customer deems an acceptable level of error rate, etc…

Start and Stop

Defining our CPI/LSS Projects

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Customer Specs:	<succinct VOC> what is it th reduce cycle time, what is a customer? If it is to reduce an acceptable level of error rate, etc…
Scope:	<describe what elements of the process will be included and excluded from analysis>
Start:	<starting point of the PROCESS, not the project>
Stop:	<end point of the PROCESS, not the project>
Unit:	<the thing being processed>
Defect:	<what you're trying to eliminate – what would your customer consider a defect – ex: any item taking longer than 3 business days to process>

Start:	**<starting point of the PROCESS, not the project>**
Stop:	**<end point of the PROCESS, not the project>**

- What is the first step in the process that you are examining?
- What is the final step in the process that you are examining?
- If you were measuring how long it takes to complete the process that your team is improving, when would you "start" and "stop" the clock?

Scope

Defining our CPI/LSS Projects

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Scope: **<describe what elements of the process will be included and excluded from analysis>**

- What process will the team examine for improvement?
- Be specific as to what is included – for example specify if you are only looking at one branch rather than all branches of the military to keep the scope manageable.
- Be specific as to what is **excluded**.
- Keep the scope small enough for an 8 week project - Do not try to "boil the ocean" or solve "world hunger"

Charter Draft & Report Out

Defining our CPI/LSS Projects

Instruction

1. **Review your draft problem statement and identify the**
   a) **Draft the Business Case and**
   b) **Draft the Unit, Defect, Cust Spec., Start, Stop, and Scope**

2. **If time permits, Identify project team members and/or organization job functions that need to participate as a member or SME**

3. **Report out…5 min max**

Remember

6-8 weeks for GB Project
3-4 Months for BB Project

Improve	dd mm yy		
Control	dd mm yy		

Charter & Timeline

Defining our CPI/LSS Projects

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Business Case:	
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Define	**dd mm yy**	**dd mm yy**	
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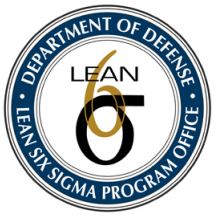
UNITED STATES OF AMERICA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SIX SIGMA PROGRAM OFFICE

Backup

CCA Project Recommendations

Defining our CPI/LSS Projects

Priority	Problem	Potential Benefits	Outcome Measure	Risks and/or Obstacles	Resources Required
1	Policies surrounding Measures of Effectiveness (MOEs) (i.e., outcome-based performance measures) and Post Implementation Review (PIR) are disjointed in the JCIDS, PPBE, and DAS.	Remove identified obstacles associated with MOE and PIR activities to improve the design, development, use, and performance of the department's IT investments.	Adoption of common/synchronized MOE/PIR language by JCIDS, PPBE, and DAS. % of policies that are interoperable and consistent.	1. Timing to influence emerging JCIDS, BCL, MDD, CPM and Capability T&E processes. 2. Entrenched systems vice capability oriented culture.	May be completed with resources from the CCA team.
2	The business rules (processes and procedures) for planning and executing a PIR are insufficient.	Remove identified obstacles associated with PIR business rules to improve the design, development, use, and performance of the department's IT investments.	Incorporation of Business Rules into relevant processes and procedures.	1. Writing procedures that will not maximize the value of a PIR for all mission areas.	May be completed with resources from the CCA team.
3	The level of review/oversight associated with the CCA Compliance Table elements is perceived as non-value added.	Align/synchronize CCA compliance table review and oversight activities with existing Defense Decision System (JCIDS, PPBE, DAS) activities and activities of BTA's Business Capability Lifecycle.	(1) Cost due to man-hour efficiency in the review and development of the CCA Compliance Table by key stakeholders, including oversight staff, subject matter experts, and program office staff. (2) Streamlined schedule for both development and review of CCA elements in assessing for certification and confirmation approvals. (3) Increased visibility and attention to certain defense acquisition avoidance milestones/activities as they support statutory and regulatory requirements for CCA compliance.	TBD	May be completed with resources from the CCA team.
4	For Business Process Re-engineering, there is a documented lack of knowledgeable resources and experienced/trained personnel.	The project would define and implement recommendations for building a core competency for coaching, mentoring and spreading a common awareness, understanding and appreciation for business process re-engineering. Effort would also include education plans for target audiences to enable a shift from output to outcome focus, an appreciation for the	(1) DoD community knows, respects and actively engages with the business process re-engineering competency center members as valuable resources. (2) Sponsors engage in a BPR approach teaming with their process partners across the DoD Enterprise prior to a materiel solution. (3) Cultural barriers breakdown by	TBD	May be completed with resources from the CCA team.

CCA Project Recommendations

Defining our CPI/LSS Projects

Priority	Problem	Potential Benefits	Outcome Measure	Risks and/or Obstacles	Resources Required
5	The quality of an AoA may limit the DoD ability to properly identify the preferred alternative.	Examines how the lack of specific mission requirements impact the quality of performed AoA's. Understanding this relationship, will lead to policy-makers being able to determine the materiel solutions that generate the largest net benefits to the program sponsor/DoD/nation and improve program planning & execution.	(1) Cost avoidance due to man-hour efficiency across service components. (2) Cost savings/avoidance due to improved cost estimation with respect to MAIS & MDAP program resources, costs and time scales.	Requires PA&E support to be successful	Requires PA&E resource(s)
6	The quality of an EA may limit the DoD ability to properly cost and schedule the preferred alternative.	Examines how the lack of specific mission requirements impact the quality of performed EA's. Understanding this relationship, will lead to policy-makers being able to determine the materiel solutions that generate the largest net benefits to the program sponsor/DoD/nation and improve program planning & execution.	(1) Cost avoidance due to man-hour efficiency across service components. (2) Cost savings/avoidance due to improved cost estimation with respect to MAIS & MDAP program resources, costs and time scales.	Requires PA&E support to be successful	Requires PA&E resource(s)

CCA Other Projects

Defining our CPI/LSS Projects

Problem	Potential Benefits	Outcome Measure	Risks and/or Obstacles	Resources Required
Knowledge base is inconsistent and training is lacking in the area of MOEs and PIR.	Remove identified obstacles associated with the knowledge base in the area of MOEs and PIR.	Number of courses using standardized MOE/PIR language.	TBD	TBD
The roles and responsibilities for conducting BPR within and across the functional areas and components are missing, misaligned, and unclear.	The project would gather further detail, collaborate and propose to eliminate identified gaps, align and clarify key roles in BPR and Clinger Cohen Compliance related processes. Effort would also synchronize appropriate policy and guidance to reflect improvements.	Roles involve both functional, cross-functional (agency & component) roles providing for the: •Accountability to effect change. •Governance across silos, breaking ties with a DoD enterprise perspective. •Elimination of Redundant compliance/certification owners and processes. •Ownership of DOTMLPF Streams engaged to lead change concurrent to technology program.	TBD	TBD
The current BPR oversight process is too far down stream to add real value. BPR activity and oversight is most effective in the pre-program or early program formation phase, rather than once the program is fully formed.	The project would improve the effectiveness of Clinger Cohen by addressing BPR compliance prior to the materiel solution first and then as a matter of defining & delivering relevant outcomes of any potential program. The current compliance process is too far down stream to add real value.	•End-to-end process measures are defined and demonstrate improvements. •Redundant systems and processes are rationalized. •Material improvements in Effectiveness & Efficiency are realized by the War-fighter & within DoD.	TBD	TBD
Determine the extent to which the implementation of BPR that was documented by the Navy ERP Program is value-added and has a	The project is being undertaken to: • Determine if BPR is value-add and has a management approved ROI.	It is anticipated that the project will realize a positive performance and schedule impact resulting in cost savings; however, at this time the financial benefits are to be	TBD	TBD

CCA Other Projects

Defining our CPI/LSS Projects

Problem	Potential Benefits	Outcome Measure	Risks and/or Obstacles	Resources Required
Due to turnover and the normal programming life cycle, there are many people involved in acquisition/ requirements/IT processes who are not aware of CCA requirements and how they need to be addressed.	Based on input of multiple stakeholders, the project would result in clearer and more standardized CCA guidance and governance across the JCIDS, DAS interface.	It is anticipated that the project will realize a positive performance and schedule impact resulting in cost savings; however, at this time the financial benefits are to be determined and verified. Insights from the in-depth case study approach will benefit other BPR projects.	TBD	TBD